

TimeOff Processing in SMART HR

A quick look at everyday processing using the TimeOff Module

Menu Group: TimeOff Processing

- **Maintain Employee Timeoff Plans** (use to do maintenance to time off plans)
 - Add, edit or stop plans for new employees, existing employees or terminating/retiring employees. **Note:** When changing an accrual rate or the hours worked per day we suggest you STOP the existing plan row, insert a new row and make the changes. Going over the top of an existing plan row to change hours worked or the accrual rate without stopping the row will automatically **change ALL existing history**. Be careful when updating.
- **TimeOff Activity – One Employee** (used to record or view leave time used)
 - Retrieve employee id, TAB, select time off year, TAB, select time off plan.
 - This window can be used to quickly view leave balances or to enter leave (time off) used.
- **TimeOff Activity – Multiple Employees** (used to record multiple employee's leave)
 - Enter an "As Of Date" that represents the time off you are recording.
 - Click on Select. AC – Active employees will be highlighted. You can click on SEND to retrieve all active employees with time off or you can further define the selection criteria.
 - When this window is saved the time off entered is automatically recorded to the employee's time off plan(s). A pop-up box tells you the number of rows processed and what the Reference Number is. To review the leave entries go to TimeOff Reports | TimeOff Extract-Reference Info and select the reference #.
- **TimeOff Activity – File Import** (used to import 3rd party leave from a sub tracking or time tracking system)
 - Click on Import and browse to find the file you want to import into SHR.
- **Accrue TimeOff By Frequency** (used to accrue leave)
 - Click on the month then click on each accrual event to the right.

Please reference the TimeOff User Manual for details and more information on using the TimeOff Module in SMART HR.